

WALLACE STEGNER ACADEMY

REQUEST FOR PROPOSALS (RFP)

Charter School Business Services Provider

Issue Date: February 3, 2026

Address: 175 S. Main Street, Suite 1050, Salt Lake City, UT 84111

Website: wallacecharter.org

Contacts: Adam Gerlach (agerlach@wsacharter.org) & Anthony Sudweeks (asudweeks@wsacharter.org)

SECTION 1: PROCUREMENT TIMELINE

- RFP Issued: February 3, 2026
- Proposal Submission Deadline: February 24, 2026, by 5:00 PM (MT)
- Proposal Review Period: February 24-March 4, 2026
- Anticipated Award Notification: March 11, 2026
- Contract Commencement: April 1, 2026
- Initial Contract Term: One (1) year
- Renewal Options: Up to four (4) additional one-year renewals (maximum five years total)

SECTION 2: ORGANIZATION OVERVIEW

Wallace Stegner Academy is a Utah public charter school LEA serving grades K–12 across five campuses. Wallace Stegner Academy operates under the authority of its Governing Board and in accordance with Utah statute, Utah State Board of Education (USBE) rules, and applicable federal requirements.

WSA is seeking proposals from qualified firms to provide charter school business services in support of Wallace Stegner Academy’s financial operations, payroll, compliance reporting, audit coordination, and related administrative business functions. All services must support the statutory authority and fiduciary responsibilities of the Governing Board and school administration.

Nothing in this RFP shall be construed to delegate educational program control, instructional decision-making, or governance authority to the selected vendor.

SECTION 3: PURPOSE OF THE RFP

The purpose of this RFP is to identify a qualified business services provider with demonstrated experience supporting Utah charter schools and public education entities.

The contract will be awarded to the proposer whose submission is determined to be the most responsive and advantageous to Wallace Stegner Academy, considering both cost and non-cost evaluation criteria.

Wallace Stegner Academy reserves the right to:

- Reject any or all proposals
- Waive minor irregularities
- Request clarification or additional documentation
- Cancel or amend this RFP at any time

Submission of a proposal does not obligate WSA to enter into a contract.

SECTION 4: PROPOSAL SUBMISSION REQUIREMENTS

A. General Instructions

- Each firm may submit one proposal.
- Proposals must be submitted electronically in PDF format.
- Pricing must be submitted as a separate, clearly labeled cost proposal.
- The email subject line must state: "WSA Charter School Business Services RFP".

B. Required Proposal Components

- Cover Letter (statement of interest, legal name, address, contact information, authorized signature, date)
- Firm Qualifications (years in operation, structure, licensure, insurance, Utah charter experience)
- Proposed Business Services aligned to Section 5
- Staffing and Service Delivery model
- Experience and References (minimum three)
- Disclosure of any substantiated fraud or compliance violations within the past ten years
- Cost Proposal (submitted separately)

SECTION 5: SCOPE OF CHARTER SCHOOL BUSINESS SERVICES

Proposals must be limited to business and administrative support services. Educational, instructional, curricular, or student program services are expressly excluded.

A. Accounting & Financial Management

- Accounts payable and receivable
- General ledger maintenance and reconciliations

- Cash and bank account management
- Vendor payment processing
- Internal controls and fraud prevention support

B. Payroll & Human Resources Administration

- Payroll processing and statutory tax filings
- Benefits administration coordination
- HR compliance support
- Personnel record maintenance
- Employee handbook and policy support

C. Financial Reporting & Regulatory Compliance

- Monthly and quarterly financial statements
- Annual Financial Report (AFR) and Annual Program Report (APR) support
- UPEFS reporting
- IRS Form 990 preparation support
- Compliance with Utah charter school financial reporting requirements

D. Audit Coordination & Oversight Support

- Coordination with independent auditors
- Audit preparation and documentation
- Single Audit support, if applicable
- Corrective action plan assistance

E. Budgeting & Financial Planning

- Annual budget development
- Multi-year financial forecasting
- Enrollment-based financial modeling
- Board-level financial analysis and reporting

F. Governance & Administrative Business Support

- Preparation of board financial reports
- Attendance at board meetings as requested
- Financial policy and procedure alignment
- Business operations consulting (non-instructional only)

SECTION 6: MINIMUM QUALIFICATIONS

- Minimum of five (5) years providing charter school business services
- Knowledge of Utah charter school finance, reporting, and compliance requirements
- Capacity to support a multi-campus LEA
- Appropriate professional licensure and insurance coverage

SECTION 7: EVALUATION CRITERIA

Proposals will be evaluated using the following weighted criteria:

Non-Cost Criteria (35 Points Total):

- Alignment with Scope of Charter School Business Services – 10 points
- Experience and Qualifications – 10 points
- References and Past Performance – 10 points
- Proposal Organization and Completeness – 5 points

Cost Criteria (65 Points Total):

- Pricing Reasonableness, Transparency, and Overall Value – 65 points

Total Possible Points: 100

Cost proposals will be evaluated independently from non-cost criteria. Wallace Stegner Academy reserves the right to seek clarification of pricing or scope as needed to ensure accurate and equitable evaluation.

SECTION 8: SUBMISSION INFORMATION

Completed proposals must be submitted electronically in PDF format. Pricing information must be submitted as a separate, clearly labeled document.

Proposals must be received no later than February 24, 2026, by 5:00 PM (MT). Late submissions will not be accepted.

Proposals shall be submitted to:

- agerlach@wsacharter.org